SERFF Tracking Number: AULD-125365781 State: Arkansas State Tracking Number: 37451 Filing Company: State Life Insurance Company

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Invitations for Retirement Income Seminars/I-20433 Project Name/Number:

### Filing at a Glance

Company: State Life Insurance Company

Product Name: Invitations for Retirement SERFF Tr Num: AULD-125365781 State: ArkansasLH

**Income Seminars** 

TOI: LTC06 Long Term Care - Other SERFF Status: Closed State Tr Num: 37451

Sub-TOI: LTC06.000 Long Term Care - Other Co Tr Num: I-20433 State Status: Filed-Closed

Co Status: Filing Type: Advertisement Reviewer(s): Harris Shearer Author: Ann Smith Disposition Date: 04/23/2008

Date Submitted: 11/20/2007 Disposition Status: Filed Implementation Date:

Implementation Date Requested: On Approval

State Filing Description:

### General Information

Project Name: Invitations for Retirement Income Seminars Status of Filing in Domicile: Pending

Project Number: I-20433 Date Approved in Domicile:

Requested Filing Mode: Review & Approval Domicile Status Comments: Currently pending

approval at domiciliary state, Indiana.

Explanation for Combination/Other: Market Type: Individual Submission Type: New Submission Group Market Size: Overall Rate Impact: Group Market Type:

Filing Status Changed: 04/23/2008

State Status Changed: 04/23/2008 Deemer Date:

Corresponding Filing Tracking Number:

Filing Description:

The referenced institutional advertisements are being submitted for your review and approval. These forms are new and do not replace any form currently in use by our company.

The company will use these invitations to gather leads for State Life's portfolio of products, which include:

Asset-Care, form number L301, (whole life with long term care provisions) approved by your department on March 8,

SERFF Tracking Number: AULD-125365781 State: Arkansas
Filing Company: State Life Insurance Company State Tracking Number: 37451

Company Tracking Number: 1-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

2006.

Annuity-Care, form number SA34, (single premium deferred annuity with long term care provisions) approved by your department on May 17, 2006.

Legacy Care, form number SA-32, (single premium deferred annuity) approved by your department on June 20, 2006.

Immediate-Care, form number SA33 (single premium immediate annuity) approved by your department on January 20, 2006.

These advertising pieces are pending approval from our domiciliary state of Indiana.

State Life has reviewed the forms and believes, to the best of its knowledge, the forms are both consistent with the laws and regulations of your state and in compliance with those laws and regulations. The forms contain no unusual or possibly controversial items deviating from normal company or industry standards.

## **Company and Contact**

#### **Filing Contact Information**

Ann Smith, Sr. Contract Analyst Ann.Smith@oneamerica.com

One American Square (317) 285-4223 [Phone]

Indianapolis, IN 46206

Filing Company Information

State Life Insurance Company CoCode: 69116 State of Domicile: Indiana

One American Square Group Code: 619 Company Type:

P.O. Box 406

Indianapolis, IN 46206 Group Name: State ID Number:

(800) 428-2316 ext. [Phone] FEIN Number: 35-0684263

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# **Filing Fees**

Fee Required? Yes

SERFF Tracking Number: AULD-125365781 State: Arkansas 37451

Filing Company: State Life Insurance Company State Tracking Number:

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

Fee Amount: \$50.00 Retaliatory? No

Fee Explanation: \$250.00 per advertisement X 2 = \$50.00

Per Company:

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

COMPANY AMOUNT DATE PROCESSED TRANSACTION #

State Life Insurance Company \$50.00 11/20/2007 16744307

Company Tracking Number: 1-20433

TOI: LTC06.000 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

### **Correspondence Summary**

### **Dispositions**

Status	Created By	Created On	Date Submitted
Filed	Harris Shearer	04/23/2008	04/23/2008

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

### **Disposition**

Disposition Date: 04/23/2008

Implementation Date:

Status: Filed Comment:

Rate data does NOT apply to filing.

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

**Item Status Public Access Item Type Item Name** Act Cert Yes **Supporting Document** Filing Fees Yes **Supporting Document** Planning for Retirement Income Invitation Filed-Closed Yes **Form** Wealth Transfer and LTC Protection Filed-Closed Yes **Form** 

Company Tracking Number: 1-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

### Form Schedule

Lead Form Number: I-20433

Review	Form	Form Type Form Name	Action	Action Specific	Readability	Attachment
Status	Number			Data		
Filed- Closed	I-20433	Advertising Planning for Retirement Income Invitation	Initial		0	I-20433 planning for retirement income invite.pdf
Filed- Closed	I-20432	Advertising Wealth Transfer and LTC Protection Invitation	Initial		0	I-20432 wealth transfer and Itc protection invite.pdf

Products and financial services provided by The State Life Insurance Company a OneAmerica® company P.O. Box 6062 Indianapolis, IN 46206-6062



# Planning for retirement income is only the first step

Learn how important health care planning should be to your overall retirement plan

Attend our upcoming seminar on effective planning beyond your retirement!

Identifying all of your income sources is only the beginning of what it takes to plan for your retirement years. You must address concerns that will affect your health and your wealth. Attend this seminar that will present life insurance and annuity solutions. There is no obligation to purchase.

Take the opportunity to RSVP for the following seminar and speak with someone who can help you review your current financial plan.

Location:
Date:
Time:
RSVP:
Seminar sponsor:
For reservations call

[Insurance products, including annuities are available through U.S. Bancorp Insurance Services, LLC, U.S. Bancorp Investments, Inc., in Montana U.S. Bancorp Insurance Services of Montana, Inc., and in Wyoming U.S. Bancorp Insurance & Investments, Inc. All are licensed insurance agencies and subsidiaries of U.S. Bancorp, and affiliates of U.S. Bank. Insurance and annuity policies are underwritten by unaffiliated insurance companies and may not be available in all states.]

Not a Deposit. Not FDIC insured. Not guaranteed by any bank. Not insured by any federal government agency.

Products medically underwritten and issued by The State Life Insurance Company, Indianapolis, Indiana. Not available in all states.

I-20433 I-20433 10/1/07

Products and financial services provided by The State Life Insurance Company a OneAmerica® company P.O. Box 6062 Indianapolis, IN 46206-6062



# Wealth Transfer and LTC protection

Learn how to address both through the use of whole life insurance

Attend our upcoming seminar on asset-protection!

If you have family or charities that could benefit from wealth transfer, or have savings and investments you wish to protect, you should attend this seminar that will present life insurance and annuity solutions. There is no obligation to purchase.

Take the opportunity to RSVP for the following seminar and speak with someone who can help you review your current financial plan.

Location:
Date:
Гіте:
RSVP:
Seminar sponsor:
For reservations call:

[Insurance products, including annuities are available through U.S. Bancorp Insurance Services, LLC, U.S. Bancorp Investments, Inc., in Montana U.S. Bancorp Insurance Services of Montana, Inc., and in Wyoming U.S. Bancorp Insurance & Investments, Inc. All are licensed insurance agencies and subsidiaries of U.S. Bancorp, and affiliates of U.S. Bank. Insurance and annuity policies are underwritten by unaffiliated insurance companies and may not be available in all states.]

Not a Deposit. Not FDIC insured. Not guaranteed by any bank. Not insured by any federal government agency.

Products medically underwritten and issued by The State Life Insurance Company, Indianapolis, Indiana. Not available in all states.

I-20432 I-20432 I-20432 I-20432 II-20432 II-2043

Company Tracking Number: 1-20433

TOI: LTC06.000 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

### **Rate Information**

Rate data does NOT apply to filing.

SERFF Tracking Number: AULD-125365781 State: Arkansas
Filing Company: State Life Insurance Company State Tracking Number: 37451

Company Tracking Number: I-20433

TOI: LTC06 Long Term Care - Other Sub-TOI: LTC06.000 Long Term Care - Other

Product Name: Invitations for Retirement Income Seminars

Project Name/Number: Invitations for Retirement Income Seminars/I-20433

### **Supporting Document Schedules**

**Review Status:** 

Satisfied -Name: Act Cert 11/20/2007

Comments:
Attachment:
ARactcert.pdf

**Review Status:** 

Satisfied -Name: Filing Fees 11/20/2007

Comments: Attachment:

AR Filing Fees.STL.pdf

#### STATE OF ARKANSAS

### **CERTIFICATION**

CARRIER:	THE STATE LIFE INSURANCE COMPANY			

SUBMISSION:

Invitations to Planning for Retirement Income &

DATE: Wealth Transfer and LTC Protection I-20433 & I-20432

November 21, 2007

I hereby certify that to the best of my knowledge and belief the above submission conforms to Arkansas Regulation 19 § 10B.

Jay B. Williams

Name

<u>Vice President, Corporate Compliance</u>

Title

# ARKANSAS DEPARTMENT OF INSURANCE FILING CERTIFICATE

I-20433

\_\_\_\_ x \$100= \_\_\_\_

Company Name: The State Life Insurance Company

Company NAIC: 69116 Company Contact Person: Ann Smith

Filing to amend Certificate of Authority.

Insurance Department Use Only

Analyst: Amount: Route Slip:

# ALL FEES ARE PER EACH INSURER, PER ANNUAL STATEMENT LINE OF BUSINESS, UNLESS OTHERWISE INDICATED.

### FEE SCHEDULE FOR ADMITTED INSURERS

### Rate/Form Filings

Life and/or Disability policy form filing and review, per each policy, contract, annuity form, per each insurer, per each filing.	x \$50=
Life and/or Disability - Filing and review of each rate filing or loss ratio guarantee filing, per each insurer.	x \$50=
Life and/or Disability Policy, Contract or Annuity Forms: Filing and review of each certificate, rider, endorsement or application if each is filed separately from the basic form.	x \$20=
Policy and contract forms, all lines, filing corrections in previously filed policy and contract forms.	x \$20=
Life and/or Disability: Filing and review of Insurer's advertising per each insurer.	2 x \$25= <u>\$50.00</u>
Amend Certificate of Authority	
Review and processing of information to amend an Insurer's Certificate of Authority.	x \$400=